

Locations Module

The Locations module is where Operating Locations are setup. Locations can be created in a hierarchal manner. For ease of data entry, always enter larger locations first so that when you enter children of the parent id you can select the parent id from a list that already exists in the database. This Chapter describes how to use the Web Work, Locations module.

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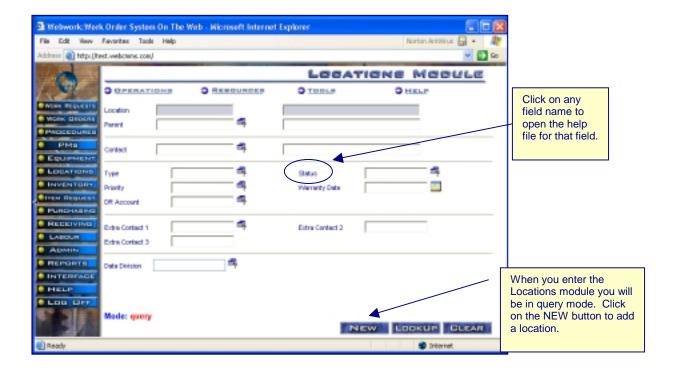
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1.1 Overview of the Locations Module

The Locations module is used to setup and query operating locations. Location records can be setup in a hierarchal fashion. You can create a main location and then any number of child locations within the main location.

Click on the LOCATIONS button on the left hand side of the screen to access the Locations module.

When you enter the Locations module you will be in Query mode as shown in the screen below:



The OPERATIONS • PERATIONS, RESOURCES • RESOURCES, TOOLS • TOOLS and HELP drop down menus contain the various features available in the Locations module.



Web Work includes "help files" for all field names. To access these help files, click on the field name. A popup window will open displaying help for the field selected.

2.1 Creating New Location Records

Location records should be created for every operating location. Operating locations are added to work orders to advise the employee/contractor of the site where work is to be performed.

2.1.1. What are Parent/Child Locations

When entering locations, always enter parent locations first (the main location) and then enter the child locations (sites within the main location). By doing so you can attach the child location to the already existing parent location record.

For example:

In a school district you may setup each school as a parent location. Then the school gym, electrical room, playground, office etc would all be setup as child locations, linked to the parent location (the school they are in).



When a parent location is added to a location record, the Parent Description, Contact and Contact Description and DR Account fields will automatically be filled in with the information that was entered on the Parent location record.

2.1.2. Adding New Location Records

To add a New Location Record:

- Enter the Locations module by selecting it from the menu on the left hand side of the Web Work screen.
- Click on the PERATION menu at the top of the Locations Screen to display the drop down menu.



The following screen will open:



• Enter information into the fields displayed on the screen. For information on field contents click on any field name – this will open a popup help window for that field name.

NOTE: The Location and Location ID fields are the only required fields, all other fields are optional.

- Click on the SAVE button at the bottom right hand side of the screen to save the Location Record.
- You will then be in edit mode: you can edit and resave the location record, print the location record
 or continue working in the module of your choice by clicking on the module button on the left hand
 side of the screen.

See the example below for more information on entering Locations.



You can add information about the Extra Contacts in the help notes for these fields by clicking on

the field name and then clicking on the APPEND button APPEND in the help screen. See the System Overview chapter of this manual for more information on adding customized information to help files.

2.1.3. Entering Locations – Example 1

Let's enter Location records for the Main Warehouse and the Electrical room in the Main Warehouse.

- Click on the LOCATIONS button Locations module.
- Click on the DEW button menu and select New Location from the drop down menu OR click on the NEW button at the bottom right hand side of the screen to open a new locations record. The mode shown at the bottom left hand side of the screen will change from query to new.
- The Main Warehouse is going to be the Parent Location for the Office and Electrical room so create its record first.
- Enter a Location ID for the Main Warehouse. IE: MAINWH
- Enter a Location Description. IE: Main Warehouse
- There is no parent location for the Main Warehouse so leave this field blank.
- Enter a Contact for the main warehouse. IE: The warehouse manager. In this example his name is Brian Nelson. You can enter his labour code (NELSONB) or click on the QUERY button to select this code from the Web Work database.
- The contact description will fill in automatically with the full name of this contact as entered in the Labour module.
- Enter a Location Type or click on the QUERY button to select a type from the Web Work database. In this example we have chosen OPERATING.
- Enter a Location Status or click on the QUERY button to select a status from the Web Work database. In this example we have chosen OPERATING.
- Enter a Priority for this location or click on the QUERY button to select a priority from the Web Work database. In this example we have chosen REGULAR.
- There is no Warranty Date so we have left this field blank.
- Enter the Account where work performed in this location is to be expensed to. In the example we have chosen 600-521-683B which is the Maintenance General Repairs Account.
- Enter an Extra Contact or click on the QUERY button to select a contact from the Web Work database. In this example we have chosen VINEA Andy Vine who is the Asst Manager of the Warehouse.
- Enter another Extra Contact or click on the QUERY button to select a contact from the Web Work database. In this example we have chosen SMITHB Brenda Smith who is the office manager of the Main Warehouse.
- Enter another Extra Contact if you choose. In this example a fourth contact was not entered.
- The data division field will display the data division of the person who is logged into the program.



The screen below shows the saved Location record displaying the information we have just entered.

- Click on the NEW button to create a location record for the Electrical room of the Main Warehouse.
- Enter a Location ID for the Main Warehouse, Electrical Room. IE: ELECRM.
- Enter a Location Description. IE: Electrical Room
- Enter MAINWH into the Parent field or click on the QUERY button to select this code from the Web Work database.
- The Parent description, Contact and Contact Description, DR Account fields will automatically be filled in with the information that was entered on the Parent location. (In this example MAINWH)
- Enter a Location Type or click on the QUERY button to select a type from the Web Work database. You may choose OPERATING as the type for this location or you may want to further define its type by entering the code for Electrical.
- Enter a Location Status or click on the QUERY button to select a status from the Web Work database. In this example we have chosen OPERATING.
- Enter a Priority for this location or click on the QUERY button to select a priority from the Web Work database. An electrical room may be a higher priority than the warehouse itself so you may want to enter HIGH as the priority for this location.
- There is no Warranty Date so we have left this field blank.
- If electrical room repairs are charged to the Electrical account as opposed to General Maintenance, change the account code that was pulled from the parent location record.
- Enter an Extra Contact or click on the QUERY button to select a contact from the Web Work database. This may be the electrician as opposed to the Asst Manager we listed on the MAINWH record. Enter any other Extra Contacts.
- Click on the SAVE button to save the Location record. The mode will change from new to Edit.

3.1 Duplicating Location Records

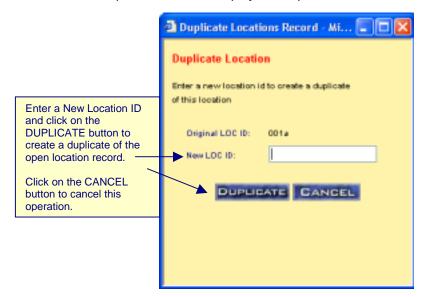
Instead of having to retype similar information for similar locations, you can create a duplicate location record and then edit the information as required, for the new location.

To Duplicate a Location Record:

- Enter the Locations module Locations by selecting it from the menu on the left hand side of the Web Work screen.
- Click on the menu while in the Locations module to display the drop down menu.
- Select Duplicate location from the drop down menu.



- The location record you wish to duplicate must be displayed on the screen. You can duplicate the
 location record after you have created and saved the original record or if the location record has
 already been saved, do a query to locate and open the applicable record (see Location Queries).
- Once the location record is open click on the OPERATIONS menu PERATIONS and select Duplicate Location from the drop down menu to display the Duplicate Location Record screen.



- Enter a new location id and then click on the DUPLICATE button
- The duplicate location record will open in Edit mode.
- Make any changes to the new location record and then click the SAVE button to save the record.

3.1.1. <u>Duplicating Locations – Example 1</u>

If you were the managers of a chain of hotels, each of the hotels may be setup as parent locations in the Web Work system.

In hotel A, there are 9 rooms on each floor.

If you wish to make each room a location, rather than reentering the same information over and over again for each of the nine records, you can enter one record and then duplicate it 8 times.

When you duplicate a record all you have to change is the location code, however any other information you choose can also be edited on a duplicate location record.

4.1 Location Specifications

Additional details about a location can be added to a location using the Specifications feature. You can later do searches on location specifications to find locations with similar attributes.

4.1.1. Adding Location Specifications

To add specifications to a location record:

- Click on the LOCATIONS module
 Dutton to open the Locations module.
- You can either create and save a new location and then add specifications to it or you can do a
 location query to locate the applicable location and then add specifications to it. See Locations
 queries for more information on location queries.
- Regardless of which method you choose, a location record must be open before you can add specifications to it.
- Click on the RESQUECES menu at the top of the screen and select Specification from the drop down menu.
- Click on the NEW Button
 Specifications screen.



- The Location field will fill in automatically with the Location ID. This is a read only field and cannot be edited.
- Add an attribute. For example: Date Opened.
- Add a value. For example: The day, month and year the building was opened.
- · Add a measure unit.
- Click on the SAVE button SAVE to save the Location Specifications and return to the locations specification screen.

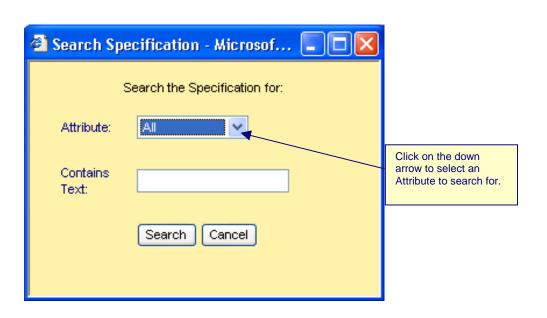
4.1.2. Search Specifications

The search specifications feature in Web Work permits you to query the Web Work database to locate locations with similar specifications.

To locate locations containing specific specifications:

- Click on the LOCATIONS module button to open the Locations module.
- Click on the Specifications from the drop down menu.
- The following screen will open:





- Select the Attribute by clicking on the down arrow and selecting the applicable attribute from the list shown.
- Enter the selection criteria into the Contains Text field.
- Click on the SEARCH button. A table showing all location records containing the selected specification will be displayed.
- Click on the check box beside the records you wish to retrieve or on Select All to retrieve all the records containing the specified criteria.

The location records you have selected will appear on the screen. If you selected multiple

location records, when you retrieve them an arrow Next will appear on the bottom left hand side of the screen. Click on this arrow to move from one location record to the next.

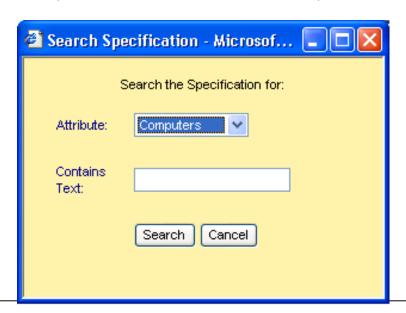
4.1.3. Search Specifications – Example 1

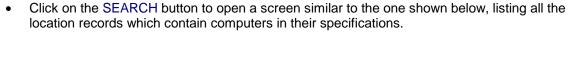
Perhaps your organization has used the Location specifications feature to keep track of how many computers are in each room within the organization. You can use the search specifications feature to locate the locations where there are computers.

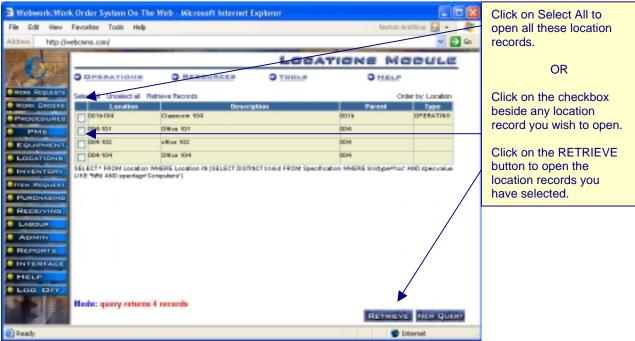
To locate rooms that have computers listed in their specifications:

- Click on the LOCATIONS module

 LOCATIONS
 button to open the Locations module.
- Click on the PERATION menu and select Search Specifications from the drop down menu.
- Enter Computers into the Attribute field of the Search Specification screen as shown below:







- Click on the checkboxes beside any of the location records you wish to open or click on SELECT ALL to open all the records.
- The records will open in edit mode.
- If you retrieved more than one record, an arrow buttons will be displayed at the bottom left

hand side of the screen. Use these arrows Next to move from one record to the next.

5.1 Deleting Locations

Caution should always be used when deleting any records from the Web Work database. However, there may be times when this is necessary. An example would be when a location record was entered in error. Since you cannot edit a location code, you would have to delete the record and begin again.

To delete a Location:

- Enter the Locations module by selecting it from the menu on the left hand side of the Web Work screen.
- Perform a Location guery to locate and open the Location you wish to delete.

Click on the PERATIONS menu at the top of the page and select Delete Location from the drop down menu.

DPERATIONS
New Location
Location Query

Duplicate Location
Delete Location
Print Selected Location
Search Specifications

A message box will appear asking if you are sure you want to delete the Location record.



• If you delete this location, any child locations will no longer reference this location as their parent. Click on the OK button to confirm this action or the CANCEL button to return to the Location record.



It is not advisable to delete any locations, which have already assigned to a Work Order, PM or Equipment Record.

6.1 Performing Location Record Queries

Find the location records you are looking for quickly and easily using Web Work's query by example feature. For more information on Query by Example see the System Overview chapter of this manual.

6.1.1. To perform a Location Query

Enter the Locations module by selecting it from the menu on the left hand side of the Web Work screen.

 When you enter the Locations module you will be in query mode. If you have been working in a different mode, click on the DEFERATIONS menu at the top of the Locations Screen to display the drop down menu.



- Select Location Query from the menu.
- The mode you are in is displayed at the bottom left hand side of the screen. (ie: query mode)
- Enter selection criteria into any of the fields. (see Example 1 below)
- Click on the LOOKUP button LOOKUP to display a list of the records, matching the specified criteria.
- To open any of these Location records click the selection box on the right hand side of the applicable Location records in the table, and then click on the RETRIEVE button the bottom of the screen.
- The Location record will appear on the screen. If you selected multiple Location records, when you retrieve them an arrow will appear on the bottom left hand side of the screen.



Click on this arrow Next to move from one location record to the next.



Comparison operators such as: <, >, null, not null and % - wild card can be used to further define a query. See System Overview – Query By Example for more information.

6.1.2. Location Queries - Example 1

Query by Example can be used to retrieve records, which contain similar characteristics. For example you may wish to see a list of all locations that are considered a high priority.

To see a listing of all Locations that are considered high priority:

- Enter the Locations module Locations by selecting it from the menu on the left hand side of the Web Work screen.
- Click on the PERATION menu while in the Locations module to display the drop down menu.
- Select Location Query from the drop down menu.
- Type 1 in the Priority field or click on the QUERY button to display and select the priority from the list of Priority codes in the Web Work database
- Click on the LOOK UP button Look up at the bottom of the screen.



A screen similar to the one shown below will open:





Click on the column headers to sort the records in either ascending or descending order.

- Select the records you wish to open by clicking on the check box at the left hand side of the location record (s) in the table.
- To select all the records click on SELECT ALL.
- Click on the RETRIEVE button RETRIEVE to retrieve the records you have selected.
- The location record will appear on the screen.



- If you selected multiple Location records, when you retrieve them an arrow Next will appear on the bottom left hand side of the screen.
- Click on this arrow to move from one Location record to the next.



After you enter the criteria into the selected fields, you can hit the ENTER button on your keyboard to open all records which match the specified criteria.

7.1 Viewing Equipment Lists

The view Equipment List function allows the user to view a list of equipment contained in the location specified on the open Location Record. This is a view only function. If you want to edit Equipment records this must be done in the Equipment module. See the Equipment module chapter of this manual for more information on editing equipment records.

To view the Equipment associated with a location:

- Enter the Locations module by selecting it from the menu on the left hand side of the Web Work screen.
- Open a Location Record. See Location queries for more information on locating a specific Location record.

 RESOURCES



- Click on the RESPURGES menu and select Equipment List from the drop down menu.
- A screen similar to the one shown below will open:



To return to the main screen of the Location record click on the CANCEL button or click on RESCURCES menu and select Details from the drop down menu.

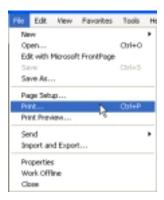
8.1 Printing Location Records

There are two ways to print location records. You can print an individual location record or multiple location records that you have selected and retrieved.

8.1.1. Printing Individual Location Records

To print only the location record that is open on the screen:

- The selected record will open in a new browser window.
- Click on File and select Print from the drop down menu to proceed with printing.



8.1.2. Printing Multiple Location Records

To print a batch of location records:

- Perform a location query to open the desired location records. See Location Queries for more information on performing location queries.
- Click on the PERATION menu and choose Print Selected Location from the drop down menu.



• The selected records will open in a new browser window. Click on File and select Print from the drop down menu to proceed with printing.

9.1 Locations - Reports

To access Locations reports click on the TERRIF menu and select Reports from the drop down menu.



A screen similar to the one shown below will open:



Click on any of the Reports listed under Standard or Custom, to open them.



Only reports applicable to the Locations module will be displayed. To view all reports, click on the REPORTS module button on the left hand side of the Web Work screen. For more information about reports, see the Reports section of this manual.

9.1.1. Creating Locations Reports

Reports cannot be created in the Locations module. To create a locations report click on the REPORTS module button to access the report writer and create the report.

9.1.2. Printing Location Reports

Location reports can be printed from the Locations module or from the Reports module.

To print a report in the Locations module:

- Open the Locations module.
- Click on the TIPLE menu and select reports from the drop down menu.
- Select the report you wish to print by clicking on its title.

The report will open in Preview mode.

• Click on File and select Print from the drop down menu to print the report.

10.1 Links

When you are in the Locations module and select Links from the menu, the Web Work Create/Edit Links window will open as shown below. You can view existing links or create new links using this feature.





You can only view links, which have been setup to be accessible from this module or from all modules. Links set up in other modules with the accessibility set as only within that module will not be shown.

For information on creating New links see the Links section of this manual.